

bvse market report: on plastics, October 2025

1 General economy with reference to the plastics industry

The ifo business climate index has fallen, see <https://www.ifo.de/fakten/2025-09-24/ifo-geschaeftsklimaindex-gesunken-september-2025>. The mood among companies in Germany has deteriorated. The ifo business climate index fell to 87.7 points in September, following on from 88.9 points in August. Companies were less satisfied with current business. Furthermore, expectations deteriorated markedly. Hopes for an economic recovery suffered a setback. The index has fallen in the manufacturing sector. Companies assess their current business situation as somewhat worse. Expectations were also more sceptical. The number of new orders fell again. The ray of hope that was seen by manufacturers of investment goods in the previous month has faded.

In addition, the VDMA published its economic survey for the 3rd quarter of 2025 on 9 October 2025, see <https://www.vdma.eu/viewer/-/v2article/render/148711973>. According to the current VDMA survey, the mood and the prospects in mechanical engineering have deteriorated further and noticeably. The current situation shows: around a third (33 %) of companies in mechanical and plant engineering assess their current situation as poor or very poor. This is the result of the most recent economic survey by the VDMA of the 877 member companies that took part in September. Although 23 % of companies assessed their situation as very good or good, more than half of companies expect no change in their situation in the next 6 months. The scepticism therefore remains for the current year. More than a third of companies (35 %) is expecting a nominal fall in turnover. 27 % of those surveyed see stagnation as realistic. Nevertheless, 38 % are expecting growth in turnover. In comparison to this, many companies are looking ahead to 2026 with more optimism: more than half (55 %) believe nominal growth in turnover is probable.

2 Primary markets - standard plastics

In September 2025, the quotes for standard plastics fell again. Note: the average prices stated here are calculated by bvse e.V. based on the EUWID quotes.

The calculated average price is therefore 1,323 €/t. And this is 26 €/t lower than in the previous month (1,349 €/t). In a year-on-year comparison, it can be seen that the average quotes from September 2025 (1,323 €/t) were 135 €/t lower than those of the previous year (1,458 €/t). The prices of standard plastics underwent the following changes in September 2025: LDPE film at -10 €/t, LLDPE film at -20 €/t, HDPE injection moulding at -15 €/t, HDPE blow moulding -15 €/t, PS crystal -50 €/t and PS impact -50 €/t.

The current market situation for virgin grade standard plastics is portrayed well in EUWID, see www.euwid-recycling.de, and PIE – Plastic Information Europe, see www.kiweb.de/.

PET: In September 2025, the prices for PET fell. The availability of the goods is still high due to the low demand and demand remains weak this month, too. Overall, the market is clearly buyer-friendly with further downwards potential for the prices. Nothing will probably change about the situation in the next month. In September 2025, packaging PET was quoted on average at 1,035 €/t and thus 35 €/t lower than in the previous month, see PIE – Plastic Information Europe www.kiweb.de/.

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3 Secondary plastics markets in the plasticker price index

The plasticker internet platform, see <http://plasticker.de>, publishes quotes on an hourly basis. The present market report indicates the final monthly prices. It is only possible to represent the preliminary prices for the month of the report, in this case October 2025; they will not become definitive until early November 2025. The two quotes stated for October 2025 below indicate only an interim situation, see the left-hand column in the tables.

3.1 plasticker: Standard plastics

The September price index shows a slightly increased demand in comparison to the previous month. In September 2025, standard plastics were quoted at an average price of 580 €/t and were thus 11 €/t higher than in the previous month (569 €/t), see table. The average price for September 2025 (580 €/t) was 3 €/t higher than that of the previous year (577 €/t). There were significant price changes of greater than ±40 €/t for: HDPE regrind -50 €/t, HDPE regranalates +60 €/t, PP regranalates +60€/t and PS regrind -100 €/t.. Those price changes for which supply figures were too low (*) for statistical significance are not included here.

The likely average price in October 2025 (487 €/t) is thus 93 €/t lower than in the previous month (580 €/t), see table. The price index October of 14.10.2025 shows lower demand in comparison to the previous month.

Standard plastics price according to plasticker; listed in €/t.

	October⁶ 25	Sept 25	Aug 25	July 25	June 25	Sept 24
HDPE regrind ¹	560	530	580	590	570	540
HDPE regranalates ⁵	820	850	790	830	830	890
LDPE bale goods ²	250*	280*	330*	390*	180*	300*
LDPE regrind ¹	380	430	430*	370	280	440*
LDPE regranalates ⁵	650	690	680	740	740*	780
PP bale goods ³	260*	340*	350*	250	170	140*
PP regrind ¹	490	480	490	530	510	540
PP regranalates ⁵	800	820	770	800	820	950
PS regrind ⁴	810	830	930	870	870	710
PS regranalates ⁵	920	920	890	850	960	970
PVC_P regrind ¹	500*	630*	550*	610*	460*	770*
PVC_U regrind ¹	0*	560*	440*	400*	320*	480
PET bale goods	0*	350*	380*	330*	190*	220*
PET regrind mixed colours	380	410	350	400	380*	350*
Average Price	(487)	580	569	569	520	577

*: Supply figure too low to attain statistical significance; ¹: equivalent to the grade post-industrial mixed colours; ²: equivalent to K49; ³: equivalent to K59; ⁴: equivalent to standard mixed colours; ⁵: equivalent to the grade regranalates black; ⁶: preview (may be amended by additional quotes).

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3.2 plasticker: Technical plastics

For September 2025, there was an average price of 1,202 €/t, which was 105 €/t lower than that of the previous month (1,307 €/t), see table The average price for September 2025 (1,202 €/t) was 319 €/t below that of the previous year (1,521 €/t).

There were significant price changes of greater than ±70 €/t for PC regranulates -300 €/t, PA 6 regranulates -280, PA 6.6 regrind -120 €/t, PA 6.6 regranulates -160 €/t, POM regrind -270 €/t and POM regranulates -140 €/t. Those price changes for which supply figures were too low (*) for statistical significance are not included here. The September price index shows purchase demand at the same level as the previous month.

The probable average price for October 2025 is quoted at 1,164 €/t and thus -38 €/t lower than in the previous month (1,202 €/t). The price index October of 14.10.2025 shows worse demand in comparison to the previous month.

Technical plastics price according to plasticker; listed in €/t.

	October ⁶ 25	Sept 25	Aug 25	July 25	June 25	Sept 24
ABS regrind	610	620	610	660	620	670
ABS regranulates ⁵	1150	1120	1170	1260	1240	1380
PC regrind	1000	970	960	1020	1050	1050
PC regranulates ⁵	1500	1500	1800	1890	1490	2340
PBT regrind	630*	570	570	570	540	640
PBT regranulates	1560	1680	1640	1710	1700	2180
PA 6 regrind	710	700	700	780	840	780
PA 6 regranulates ⁵	1450	1570	1850	1950	1800	2210
PA 6.6 regrind	1020	940	1060	1010	1040	1000
PA 6.6 regranulates ⁵	1850	2000	2160	2180	2300	2690
POM regrind	630*	580	850	820*	830*	750*
POM regranulates ⁵	1860	2170	2310	2440	2030	2560
Average Price	(1164)	1202	1307	1358	1290	1521

*: Supply figure too low to attain statistical significance; ⁵equivalent to the grade "regranulates, black"; ⁶: preview (may be amended by additional quotes)

4 Secondary plastics markets

Demand remained low in September for secondary plastics and the pressure of the preceding months continued to be felt. Political measures are still awaited, although industry associations are strongly urging change so that the recycling sector can finally experience an upswing again. The situation is similar for PET recycling: weak demand and affordable competition from virgin grade and imported recyclates. An excellent summary of the difficult situation for plastics recycling can be found in EUWID RE 41, 2025, p. 19.

4.1 Recycling standard plastics

The market for secondary plastics was still under pressure in September. Since the virgin grade prices for standard plastics are continuing to fall, the pressure of recyclates is therefore rising.

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Unfortunately, the price gap is currently so big that companies are not using secondary raw materials for economic reasons. Unfortunately, there are no incentives or political support, which is why industry associations have once again stressed their demands to the EU Commission. The industry urgently needs support in the form of fair competition conditions, immediate recycle quotas to prevent further insolvencies and falling energy costs. This is the only way to prevent a complete collapse of plastic recycling.

EUWID: The prices of standard plastics stabilised in the September price index. Slight price falls can be seen in some PE post-user films. The arithmetic average is lower for: LDPE film mixed (K49) -2.5 €/t, PE film transparent natural < 70 µm -7.5 €/t, PE commercial mixed film (90/10) -10 €/t and PE commercial mixed film (80/20) -10 €/t. The remaining prices are still at the same level as the previous month.

plasticker: The price index records slightly higher purchase demand for standard plastics in September. In October, however, there was lower purchase demand. In September 2025, standard plastics were quoted at an average price of 580 €/t and thus 11 €/t higher than in the previous month (569 €/t). The probable average price in October 2025 (487 €/t) is thus 93 €/t lower than in the previous month (580 €/t). The average quotes for standard plastics settled around 530 €/t.

PIE – Plastic Information Europe, regranulates: In September 2025, most standard plastic regranulates were quoted lower. The average price falls were in the range of 5 €/t to 20 €/t. Demand for recyclates remains low after the holiday period and there have been no positive impulses. The cheapest virgin grade is competition. In addition, the prices of PE-LD injection moulding and PE-HD pipe are stable, see www.kiweb.de/.

4.2 Recycling technical plastics

The anticipated increase in demand after the holiday months has unfortunately failed to materialise for technical plastics. The markets continue to report weak demand and a fall in prices. Imports from China still remain noticeable on the market.

plasticker: For September 2025, there was an average price of 1,202 €/t, which was 105 €/t lower than that of the previous month (1,307 €/t). The September price index shows consistent purchase demand, although the October price index shows lower price demand than in the previous months.

PIE – Plastic Information Europe, regranulates: In September 2025, too, technical plastics are quoted lower than in the previous month. Unfortunately, the anticipated demand and price stabilisation failed to materialise. Warehouses are still well filled thanks to cheap imports from China. Commodities reported average price falls of 10 €/t to 60 €/t, see www.kiweb.de/. Unfortunately, no improvement in the situation can be expected for the next few months.

4.3 PET recycling

Price pressure for PET recycling remained in September. Thanks to the weak demand and cheap competition from imports of virgin grade and recyclates, the situation will probably remain unchanged until the end of the year. The pressure can also be felt in the industry here.

Consequently, the trend of falling bottle prices for used PET single use deposit bottles is continuing and rose in comparison to the previous month as follows: PET transparent -70 €/t, PET mixed -60 €/t and PET coloured -40 €/t, see EUWID. The weak demand will remain for the time being due to the price pressure. PET recyclers are not expecting an improvement until the spring.

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For virgin grade, in this case granulates, the average value in PIE – Plastic Information Europe is 1,035 €/t, which is 35 €/t below the value of the previous month. Price fall for flakes and regranulates: regranulates are valued at 1,640 €/t on average in PIE – Plastic Information Europe. Clear, food-safe flakes are quoted at an average 1,300 €/t in PIE – Plastic Information Europe. Both prices are lower than in the previous month.

Reporting on PET markets is of central importance in EUWID and PIE – Plastic Information Europe. Detailed monthly reports on the PET prices for virgin grade, and for used beverage bottles and market assessments can be found in EUWID and PIE - Plastics Information Europe.

5 Explanation on the price quotes

A detailed discussion with information of price indices for virgin grades and waste plastics as well as precursor products can be found in EUWID Recycling and Disposal see www.euwid.de. EUWID: No guarantee for any of the prices here; prices ex station. As a rule, the prices quoted refer to quantities in excess of 20 tons.

The quotes for secondary prices, which are updated on an hourly basis, can be calculated using the price lists that are derived from the quotations published in the raw material exchange plasticker, see www.plasticker.de. The prices listed in this index are quoted without reservation - as the majority of the quotes submitted are not necessarily equivalent to the sales prices. Plasticker offers the quality grades regrind and regranulates both as virgin materials and as secondary goods. The term 'bale goods' refers to waste plastics only. Furthermore, plasticker does not distinguish between the following grades: transparent, mixed colours or colour-separated. Therefore, the information provided by plasticker may indicate different market behaviour than the prices quoted by EUWID

A detailed discussion with information of price indices for virgin grades and waste plastics as well as precursor products can be found in PIE – Plastics Information Europe, see www.kiweb.de. For virgin grades, the indices for standard plastics (Plastixx ST) and technical plastics (Plastixx TT) provide a good overview of the price trends. Pieweb quotes the monthly regranulates prices for standard plastics and technical plastics in the secondary markets. For secondary plastics, there are also details on PET, in this case flakes (flakes transparent, flakes mixed colours) as well as transparent regranulates.

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